Integrating Innovative Employment & Economic Stability Strategies (IIEESS) Webinar Transcript

Peer-To-Peer Learning Opportunity: Introduction to Learn, Innovate, Improve (LI^2) and Implications for Coaching Interventions

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MEGAN YARBER: I want to review a couple of housekeeping items with you, and explain how you can participate in today's session. When you join today's call, you may have noticed that you've been placed into listen only mode. If you have questions you would like the presenters to address, please submit them in a Q&A box located on the right hand side of your WebEx window. Now onto the system. When you logged in to the webinar today, your screen should've looked like the area to the top right hand side of my slides. On the far right of this screen, you should see a section where you can chat or submit questions. Even though both sections are available to you please submit all of your questions using the Q&A box. You also have the ability to change the view on your screen. To change your view please select the full screen, double arrow button, located in the same window as the presentation. You can see this highlighted on my slide. To exit full screen mode, hover your mouse at the top of your screen and select the blue return button from the drop down menu that appears. If the presenter's video box is covering any part of your presentation, hoover over the top left hand corner of the box and click the arrow to minimize it. Please note that today's webinar will be recorded. If you experience any difficulties during the webinar, please call the WebEx customer service number, at 1-866-229-3239, option one. Now I would like to introduce Damon Waters, Program Specialist with the Office of Family Assistance. Damon?

DAMON WATERS: Good morning, everyone, and I hope everyone is celebrating a good spring Monday. I wanted to welcome seven of our eight sites to today's webinar, and we're extremely excited to have Project Improve who's our contractor at Mathematica Policy Research, to discuss the LI squared process. We hope after today's call you will have an overview of the LI squared process. You'll use some of the examples that Michelle and her team will be sharing with you, to think about how you can use LI squared and the Project Improve team as a different tool inside your toolbox in working with your coach to implement your action plan. So with that, I want to turn it over to Michelle, but I want to thank Lisa Washington-Thomas, our Branch Chief here in the Self-Sufficiency Branch in OFA; Clarence Carter, our Director; Susan Golonka, our Deputy Director; and everyone else at the OFA team who was able to join us today. So, Michelle?

MICHELLE DERR: Thank you Damon. And we'd also like to thank Damon, who is Project Officer over the project that, icer—is it? No, IIEESS, sorry, all the acronyms. And also as well as Project Improve. And this webinar that we're sharing is, and LI squared process is a process that we're using as part of project improve and all the TA that we provide. So by way of introduction, today what we'll cover is kind of an overview of the LI squared process, or learn, innovate, improve. And then we're just going to go down each one of the phases and give you some examples of the types of activities that we do in those stages, and the purpose of those stages in terms of improving the change process. And then we'll talk a little bit about how we use LI squared process in our own work in developing coaching interventions. So, go ahead, next slide. Now I'm a little bit hoarse today because I'm recovering from laryngitis so I apologize for that.

So, I just want to give you a little background about why. How LI squared came about in general. And I think even before we get to that slide, Scott… You know, I've been studying employment and training programs for twenty years here at Mathematica I've gone all over the country. And about three years ago I came to a point of saying, there has to be something different, in terms of program change. And so that led us now, that led me and others within Mathematica down a road, two different roads in a lot of ways. One was a desire to create new strategies that are science informed. And really drawing upon the behavioral science. So that was one avenue that we went down, as how do we create new research science informed interventions? And the second road that we went down simultaneously, was how do we develop a better way of working with sites? A more analytic process around program change, that's more efficient, that's more effective. That really gets at what's working and for whom. To bring about, again this desired change that we were hoping for. So that led us down to several partnerships, including one with Harvard Center on the Developing Child. And they used, they were, and it's an interesting story, so I'm just going to take a couple minutes to share with you the relationships we had. They had gotten only so, they had realized they could only get so far in improving outcomes for kids without addressing the needs of adults. So they partnered with me and a former colleague Donna Pavetti, to say how can we more effectively reach kids through adult programming? And specifically through public agencies. And in that partnership they brought to the table a process called the translational science model. Now it's called ideas, the ideas framework. And it was an analytic process for taking research or science and translating it down to the field to practitioners. When Donna and I looked at that model, we realized that might work in some settings, in the settings that they were in, but it wouldn't necessarily work in TANF agencies and the places where we were. So what we did, is in partnership with Harvard we adapted that translational science model, and we also brought to the table other kind of innovative change management strategies. Including, plan, do, study, act in the healthcare field. It was a model in child welfare. It was the human centered design. As well as our own kind of emphasis on implementation and implementation science. So together, over a two year period, we iterated work with the science community, work with practitioners. To get the language right, to get the process right, and as a result of that, where we landed was on LI squared. So it was a long process that was very intentional. And it included, like I said, practitioners from the field. And as a result of that when we go out and use this process, practitioners really like it. And we say that's because it was developed in partnership with people like you, who are the users. So that background just gives you a little bit of context of the why. And again, this was designed to give states and localities tools for program change, that's a more efficient and effective process.

So what is LI squared or learn, innovate, improve process? It's a change management process, and it provides this framework for continuous quality improvement. It's not just about the initial change, but it’s about using analytic techniques for further refining and testing and designing and implementing changes. What we hear from sites, frequently, is it changes our identity and how we approach program change. It's not just a process we use once or twice. It becomes something that we do regularly. And it's included in, it's three phases, very distinct phases that are really informed by the evidence and a collaborative process between researchers and practitioners at each stage. So, next slide. So you see here this graphic that we use. And we represent it as a circle for a really important reason, and that is, there's really this iterative process. We oftentimes begin with the learn stage, but we don't necessarily need to. We can start with the innovate stage, and the improve stage. But typically we back up and make sure that we're clear on the Learn and Innovate stage. So I'm want to go into each one of those stages in greater detail. So this slide again, there's multiple on ramps. There's multiple off ramps, but it is this kind of circular continuous process. Next slide. So again, I already mentioned how it was developed. This kind of iteration from the translational science model. And we have worked extensively with practitioners to refine it over time. Next slide.

The key features of LI squared is really the close collaboration between the TA team and program staff. We really talk about it as a co-creative process. And we encourage co-creation at all levels. At the administrative level, at the staff level. And we're strategic about how we do that. And I can talk a little bit more about that in the question and answer. And there really is this focus on analytic evidence and approaches at every stage. And what that does is builds the foundation for later future evaluation. Evaluation that can provide evidence. Both what we call the lower case e, evidence in terms of feedback that administrators can use. And staff can use to make quick decisions about how to improve to tweak their design. Or the implementation of it. And then larger, that larger e as in evidence in terms of building the evidence base for the field. Next slide.

So, I'm going to go into a little bit of depth on each of the stages. The learn stage, the objective is really to figure out, to really assess the program environment and clarify the reasons for making a program change. If you're figuring out what problem is it that we want to solve. And in addition to that, it's really figuring out, what's the environmental readiness for change. This is an important stage, because what we've found in other programs is that there's a lot of noise in program environments. And so you really have to pay attention to not only why you're making the change, but what kind of headwinds and tailwinds might you have in that change process within the environment. Next stage. The innovate stage, is really figuring out this roadmap for change. Developing a roadmap for change. And the roadmap for change, is really drawing, in this innovate stage, is drawing upon the research evidence. Science of human behavior and what we know from practice wisdom. And really starting to align, what strategies are we planning to implement? What behaviors are we targeting for change? In other words what would need to change in people's behaviors? That can be staff, that can be clients, or organizations in order for that desired change to occur. And then what kind of outcomes would we expect? And it is in getting that narrative alignment between the strategies, the targets for change, and then the outcomes for change. You really start to refine and get more efficient in your change process. Because oftentimes what happens is sites will come with lots of changes, all at once, and we'll help them really refine it, into the core essence of what it is that they're trying to achieve. But in that process, it makes a more efficient change process, and reduces change fatigue of staff. Next slide.

So, tips for successful innovation. We hear about the, you know we do this quite a bit, what we've learned is innovation requires, the time to think the space to try, and the safety to fail. But we have a motto in this, is that we fail fast. It is again, drawing upon the best available research evidence science of human behavior and practice wisdom, and figuring out who are the right people to be in the room and when are those people, should those people be in the room. And, again, I can talk a little bit more about that in the Question and Answer. Next slide.

The improve stage. Once you've identified and articulated this roadmap for change, it's time to try it out, and what we call give it a road test. That's the time where experiment, play, try out the intervention, and you collect data, or information on what's working and for whom. And it's kind of a rapid cycle, and then what you do is gather this information, analyze the information quickly, and then feed that back into the change process. So it's this opportunity to kind of make mistakes, and to learn from those mistakes. And then refine the intervention. And I'll give a lot of examples of that later on in this presentation. So this idea of test and then test again, and then test again until you get it right. And, in a lot of ways it really is an efficient change process and a very targeted change process. Next slide.

So, the thought is, in the whole LI squared process is that you start with a road test, and then that sets you up as you decide and you work out the bugs with the road test. And then, as you start to scale up, it creates opportunities for what we call rapid cycle evaluation, where you can build into your system. Some people will get the treatment group and some will get just business as usual. And then you can use some administrative data or other data to really figure out whether not it's making a difference. And then that over time can lead to a potential impact evaluation. This is, you know, this notion of continuous improvement and scaling and building evidence for the field. But, and a lot of times, you know, programs can just stay on the road test stage, it doesn't necessarily mean they have to advance to other kinds of evaluation. It's just showing that you're creating the foundation for this progression that will occur over time. Next slide.

So, I just want to spend a little more time in each of the stages, and give you a little bit more background on each of these. So again, the learn stage is really to clarify the purpose of and opportunities for change. Next slide. So, again, it's really figuring out, what is the site's commitment to, and readiness for change? And again, you know, what we're finding is, and many of you can probably relate to this, is that there are layers upon layers upon layers of bureaucracy that has accumulated in TANF programs over 20 years. And we're even getting to the point where some programs when we go out and we do this change process, they're not even sure why, or whether, they think it's federal policy, in terms of federal regulations. But when you start to unpack it with them, we quickly realize that it really is beyond that, that's it's more of tradition and perception about what was required that has been accumulating over time. And so what we often do is strip it down to the fundamental requirements, and the cleanest possible program environment. And what it does is it frees up staff, it frees up clients, and it also creates an opportunity for an intervention to stick. So really in the learn stage you're setting it up for this notion of adapting the intervention to fit the program environment and to be fully integrated. Because otherwise it will be the latest greatest fad, slapped onto what you already do, and then staff will revert back to what they know. Which is what they do unless it's well integrated into the program. Again, I mentioned that this is influenced by implementation researchers and implementation science. So we really do care about this good fit within the program. Next slide.

So in this innovate stage in terms of creating a roadmap for change. We're going to send you these slides, as well as couple of briefs we've written on the project, another project, for administration for children and families that will go into a little bit more detail but I'm going to go through this fairly quickly. So in creating that roadmap for change. Again, as I mentioned. Next slide. It really is creating the plan for achieving the program's goals. So you set out, and you say, this is the problem that I really wanted to solve. And you've identified that in the learn stage. And then you say, you know, look at the environmental readiness for that. But then you're also looking at it and saying, okay what is it again, what is it that we're going to do, and how will it change people's circumstances, their behaviors, their attitudes, their beliefs, and then what will be the outcome of that? Next slide. So, we also think about this as a recipe for replication. And so it's this iterative process where you're putting stakes in the ground and then you're using the road test process to refine that recipe over time. And so it's really this refining, refining, refining that gets you to this kind of recipe for replication that is necessary when you want to scale up. Next slide. So the components of the roadmap, again, I mentioned all of these. Next slide. And then these overarching goals, is really, you know the overarching goal is really to be as specific and narrow as possible. When we go through this process with sites, what they say is I feel relieved. It feels simple, it feels doable. And in a lot of ways what we do is take very complex very ambitious strategic planning processes and boil them down to the essence. And that's what frees people up and creates greater efficiency in the change process. Next slide.

So, again, and I mentioned this earlier, it really is getting this kind of logic. Why do we think that those strategies will lead to those outcomes? I always give this example and I like to share it. I've gone all over the country and studied employment training programs that I mentioned. And I often ask, what is it that you expect to change from your program? What is it that you're hoping to achieve? And what I often hear is, you know, help families become self-sufficient. And there's often times, you know I hear this, our desire is to help families become self-sufficient, but then the strategies that we're using to do that are more like six weeks of independent job search, or very light touch strategies. And so it's being realistic about, we don't have the resources to do a lot. So then be realistic about what you can change. Don't claim, I'm going to lead families to self-sufficiency just because it's kind of the buzz word of the day. Be really specific about, you have the resources to do x then that may be a small change and that's okay. But being clear about that change is really what you want to hope to get. Next slide. So, this is a simple, you know, so this is a simple, you know, mentioned moderators, these are the kind of contextual factors that may or may not influence. But I think the blue areas are really where you want to focus on and make sure that you can get. Again what will you do, what will you change as a result of that, and what will success look like. Next slide. This is just to give an example of a roadmap for change. From an actual program that we worked with. And you can see operating incentives for coming to orientation within seven days. And then what was that change about, what are we targeting for change? What we're targeting is early customer engagement. We're targeting their motivation, their planning, their task initiation, and then the outcome is, the desired outcome is really engagement enrollment in employment services within a week of referral. It's not things like broader self-sufficiency. It's really aligned with the strategies that we're trying to implement. Next slide.

So you have a road map now, now what? What you can do is use that to define a road test. And, again, as I mentioned, it's treating a roadmap as a living document that can be revised and refined over time. And, what's also useful about this is it becomes a guide for performance management and continuous quality improvement. And in the research world we often call this, you know, the opportunity to have fidelity measures. You put stakes in the ground to say. Here we've iterated and tested this over time. We've adjusted our roadmap for change, and now we know what are the secret ingredients that are going to help us to get to that place of really where do we think the sweet spot is in terms of improving outcomes for families. Next slide.

So now I'm going to talk a little bit about road tests. Next slide. So what is a road test? A road test is once you've articulated your roadmap for change, you've got your strategies, they're typed. They're aligned well with what you're targeting for outcomes. Then it's saying, let's just take, and the road test can look different for different reasons. The concept of it is to say, let's try it out on a small scale, and try it out with a few clients, and iterate before we fully commit to it. And try it out, and play, and make messes, and learn from it. What's working, and for whom? Under what circumstances is it working? Under what circumstances is it not working? And really gathering that feedback, and refining that model before you scale up. Before you commit to it. And again, what this really does is it reduces change fatigue for staff. And the people you're engaging and collecting information from are both staff, clients, they can be a whole host of different things. I'm getting ahead of myself so let's us. Next slide. The one way, the way that road tests work is this again, iterative process. It's really trying it out in a short period of time. You know this is just an example. It's not set in cement how long the learning cycles are, or how many learning cycles you have. But this notion of trying something out, learning from it, reflecting on it, making changes, and then rolling it out again. And then reflecting on it, making changes again, and rolling it out again. This is just an example of six week iterations. We did something similar to this in Ramsey County. I'll talk about this in just a second. Next slide.

So, in order to get started you really need to start. Again, you've got your learn cycle over. You've got your roadmap for change. And you're really stepping back and saying, what is it we want to learn from this road test process, and then the specific learning cycle. It's really figuring out, what's our agenda for this starting out? Next slide. And then it's figuring out, what's the timing for it? And, it often can be influenced by a whole host of things. It can be influenced by how long you have in terms of your change process if this is a drawn out change process. I know, for example, like Washington State's taking a year to figure out how they're revising their case management process. So the road test cycles can be a little longer. We've got other sites that are on a very fast, tight timeline. Where we've done shorter learning cycles. In general we recommend at least two different learning cycles. And we've gone as short as two weeks, and as long as six weeks, but we wouldn't go much longer than six weeks for a learning cycle. Next slide.

This notion of gathering feedback. What you want to understand, and it all is driven by the goals or the learning objectives of the road test. And, really what you're trying to do is gather feedback from key stakeholders. This can be staff, this can be clients, it could be other key stakeholders. And really figuring out what's the easiest most efficient way to collect input. I mean short questionnaires, short interviews, focus groups. And then, thinking through, are there other, are there any other interactions that are the key to the success of your strategy. And then gathering those observations. And I can give you some additional examples of this. You know, we rolled out, and did a road test of an online coaching intervention that was implemented in Fort Collins Colorado. Where we actually got data from the online tool that helped feed in, excuse me, that helped feed in to the road test process. So we got client observations, we got staff observations, and we got actual user data in that road test. And what was interesting about that, I'm going to share with you a little snippet of it, you know, when we talked to clients, they said they loved it, talked to staff, they said they loved it. But when we actually looked at the user data, what we found was, not very many people were logging on. So they were saying on thing and they were doing another. And it was only in looking at that user data that we were able to detect that problem. So we brought that data back to the staff, to the administrators and then we were able to make a change that brought the user on. And that change was that they had to logon to report their hours and activities. And that actually was a productive change in a couple of ways. It was a productive change and it exposed them to the system, but it also created for a more efficient way for them to report their hours and activities. Excuse me, which they weren't planning to do. So that's an example of how gathering information from different sources can give you more information about how to kind of, how well the intervention is working at the time. Next slide.

This is another, you know, we use a lot of the google forms or survey monkey, and what we suggest is. So I travel a lot for work, and I get these Delta, you know, or other airlines, they'll say click on this link and answer these five questions. That's exactly what it's like. So we often send out an email, you know, we have sites doing this. They send out an emails. It has a list of ten questions on their interactions with clients from the previous day. Or feedback from that week, and that actually populates into an Excel spreadsheet. So it's quick to analyze, it's easy to collect, and it's short to answer. And so, it really does create this efficient way of gathering information. I think it's really important to note, when we first started doing this, I realize, we rolled this out, and practitioners and staff were just, when we talked about the road test process they all went pale white. They were like, we didn't got to social services to do research. We don't like that, makes us nervous that whole thing. You know, that same site, we talked it through, we said, you know this is really about gathering your experience with using the model and it's really going to save you grief three months, six months down the road because if you don't do that, what ends up happening is bad policy, bad programs get implemented and then you're stuck with them. So there's an opportunity to give voice and to participate in the change process from the very beginning that allows it to make sure that we get it right before we scale up and commit to it. And so what we find is that staff ask for, when are we going to road test things, when are we going to road test it to administrators even before the administrators say it to them because they found it so useful and they feel so a part of the change process. That same site in fact, where we had that experience, they're now on their eighth road test, they're doing it on their own and they have no research staff. This is staff and administrators saying, let's change the way we think about change, into doing it in a more efficient effective way. And rally working out the bugs before committing to a practice. Next slide. So this is just an example of a calendar we've used, in one of our road test processes. This one we did interviews, and we did some check-ins, we did observations, we did some focus groups. This is more extensive. This is probably more extensive than most of you would do. We have some sites that just do a simple online survey and then they have some check-ins with their supervisor to provide feedback. Next slide.

So, analyzing the feedback, again it's really thinking through, did we see any trends, what are the experiences, what are the staff responses. And then, rethinking your, what did we learn from that? And then what changes do we make? What's really important about this whole process, you know, we've done, you know, dozens of road tests with sites. Is that, when we've done the road test, and we shared it with information where we coach sites on how to do a road test. You know, we as researchers are not involved, we don't tell people what to do. We actually bring the results back to the staff, and back to the administrators and say, here's how it went in the first learning cycle, and as part of the road test, what do you want to do? And so that really relies on the practitioners to make the decisions in terms of what needs to change and for whom it needs to change. And it's also important to note that this is really a qualitative kind of exercise, it's descriptive. It's not intended to be causal. I talk about it as, you know, this is a chance, a road test, think of a road test. When you road test a car. You want to see how it accelerates. You want to see how it turns. You want to see how it starts, stops. You really want to try out a lot of different things, and gather information about what works for you or your program. Next slide. So again, this refining the innovation it's really thinking through and as I mentioned, going back to the field and talking with practitioners. Again, you guys can have these slides for your own information, there's a lot of detail on this, that we concluded on that you can have it when we send it out. Next slide.

So, here's where I want to pause and just give you some concrete examples. You know we've done a lot of road tests on a variety of different topics. We owe two generation programs, and also some coaching. Most of our road testing is actually done on coaching interventions. We've done some behavior insights, some nudges to increase engagement. But most of it's really been on coaching interventions. Mathematica, I mentioned to you in the earlier, you know at the beginning of my presentation, that we, started down a road to say, how do you use science to inform programming? And it took us down this road of creating a coaching intervention… Next slide… that's called, Goal4 It!. And, this is, we really refined this, Goal4 It!, and built Goal4! It using the LI squared process in working with a variety of sites. Working with the science community at Harvard center for the developing child, and a whole host of others. We also worked with a set of practitioners in a variety of different sites and then we road tested. We tried it out, we road tested, we made our mistakes. And over three years of road testing, and analyzing and this LI squared process we came to Goal4 It! Finally. And what it is, is a behavioral science informed coaching approach. There's an explicit focus on self-regulation and goal achievement within public agencies. And we really stress this, because this is the challenge. It wasn't just coaching for coaching's sake, it was coaching within a TANF regulatory environment with no new resources. So how do you do coaching with no extra money by just changing the way that you provide services without adding new resources? It's also grounded in some work done by Harvard Center on the Developing Child. I'm just giving you some background so you understand the road test. And it really is focused on strengthening core skills, reducing sources of stress, and supporting responsive relationships. So we road tested this, and we're still road testing this, and in fact that's why I'm hoarse. Because I was out on the road in three different communities, setting up road tests on Goal4 It! Specifically. Next slide.

So, in the early stages of development, we used our specific sites to really road test this. And Larimer County Fort Collins, and then Ramsey County, St. Paul. We did a whole host of different learning cycles, and then also in San Francisco Project 500, as well as Jefferson County which is in Golden Colorado. What I want to illustrate on this one is we used two very different techniques for road testing on these different sites. And it was really generative. So we started out with Ramsey County and that process started out three years ago. And we did a whole series of different road tests. We mostly focused on six week learning cycles, and limited it to ten different staff, seven or eight different staff at one time. Working with ten different families at one time, and we gathered information over time. We rolled that out in the same way in Fort Collins. And then what we learned is, in some sites that worked well, especially the timeline. But specifically in Project 500, we tried that learning cycle approach and it just didn't take. And so what we did was, we came back and said, let's do a boot camp. Let's immerse the staff in and force them to use the Goal4 It! Tools for a ten day period with every client they see. And let's gather data points on all their exchanges each day. So we have, actually 90 different data points. We had a 90% response rate. They collected data every single day, they answered a short survey every day, and they met every single day with their supervisor as a group. And they provided feedback, and their supervisor sent us daily feedback about the road test. What was going on for that day. And it was such an eye opening experience, because we weren't getting at the problem and this boot-camp approach really exposed the problems, in a very quick way, and a very powerful way. And what we learned from that boot camp were the problems that we really needed to fix. And, these were problems that were percolating up on other sites but more intensively, I called it a stress test. So we did the same thing in Jefferson County and found a similar result. So, what that led to was this refining, refining, refining. But what I want to do is share with you, and so again, two different ways of doing road tests is kind of a longer traditional version of road tests, and then the boot camp version. And what we found in each of these sites was this. Next slide.

These were some of the key findings we took away. And that was, this is complicated. And I thought this would be helpful for you guys, in rolling out coaching strategies. That's really complicated, that you guys are implementing coaching interventions in very complex regulatory environments. And so our model is, what happens is, if you just add on, staff revert back to what they know when they're under stress. So they'll leave the training and they'll just go back to business as usual. So what we realized was, we had to add and we had to subtract. So, things like the individual responsibility plans, we had to build it into the tools that we were already using. And so we took the tools that we were using, added some of the state requirements, and that became the form. So, this effort to simplify and streamline was really important. And again, something we learned from the road test. Another thing we learned from the road test, was that, you can't go out and say, we're going to do coaching, we're going to do goal setting, clients in the driver's seat, those kinds of things. And then at the same time, have this WPR conversation. That is really important that those two conversations are integrated. So the reality is that the WPR is here, but what I would argue is, that doesn't preclude you from doing coaching. And doing coaching doesn't mean you have to abandon the WPR. What it does mean is, you have to give it context. And I could talk more about that, I could spend an hour just on any one of these bullets. But this, otherwise if you don't sort that out, that you will create a mixed message for staff, and you'll create a mixed message for clients. The other thing is, we learned was, that really infusing coaching and goal-setting at all levels is critical. So we're now implementing, you know, about to road test actually in Ramsey County a Goal4 It! for supervisors to work with staff, and the same Goal4 It! similar, Goal4 It! process that staff use with clients. So this kind of modeling through the agency is really critical to that. The last thing is, we got some more bullets after this, on the slide, is really that, coaching and goal oriented exchanges do not necessarily take reduced case loads or more time or more staff. That it is a fundamental shift in how staff and clients interact. And I can't underscore that enough. We have some sites that have case loads of 90, and some sites that have case loads of 25. And the reality is the process is similar, in that in really is about changing the ways in which staff are interacting with clients. Next slide.

We also learned through this road test process that really and specific to coaching, again, it's advice to you guys as you go through this and the coaching process, is that you know, staff have been socialized for 20 years around a compliance oriented system, and one that focuses on chasing after barriers. And so, in some ways we had to, in many ways, re-socialize staff. I call it the fixers and the nixers. We had people, we were trying to get them to do coaching, and really what they wanted to do was gravitate back to what they already knew, and that's, I'm going to tell you what to do and I'm going to sanction you if you don't do it. Or, the fixers who said, tell me all your problems and I'm going to solve them for you. And really, if you're doing a coaching intervention, neither one of those models will work, for us at least. And so we really had to re-socialize staff, and continue to have to re-socialize staff around a coaching goal achievement mindset rather than just thinking they're going to get it on their own. A couple of other findings is that progress and customer skill building requires frequent regular follow ups with customers. I can talk to you about how we adjusted and adapted. What we heard was, you know, coaching sessions were taking two and three hours. And what we are now aiming for is a half hour. So how do you have a more, you know, we have to make changes to get it down to that level so that you could have those more frequent interactions. And then this accountability, essential to goal progress and improving both staff and customer outcomes. And finally, again, what we learned was fail fast. So that was a lot of information thrown at you. Again, we could not have gotten to those findings had we not road tested and used LI squared process. And each of the sites that worked with us said that the process itself led to a more efficient effective change process. So, I'm going to pause there. I know that was a lot of slides to get through. And we have about 15 more minutes for questions or answers that I, responses we can provide. What questions do you have?

MEGAN: Michelle?

MICHELLE: Yep.

MEGAN: Looks like we have just a few questions. For the first question, when thinking about initial steps in working with site coaches, from your experience, what has been the initial step for successful implementation within TANF programs investing in change?

MICHELLE: You know for me, I never go out and do strategic planning or you know, invest in the change process. I have not to date yet, without going through a learn process. And ideally, and in almost every case I've done this, is going out in the field and talking with, at least spending one day, talking with staff, talking with administrators before you ever even embark on change. Because really understanding and knowing the context, hearing it just from administrators is very different than listening to what is going on at all different levels. So I, that's my own personal bias is really spend time with the people who are in the trenches doing the work. And what that does is not only gives our team information moving forward about how to structure, the technical assistance process. But it also creates a buzz and a buy in that you can't get any other way.

MEGAN: In your opinion what are some of the most prominent barriers to change and how TANF programs and others solve those?

MICHELLE: Some of the most prominent barriers to change, you know, and I'm going to have Anna chime in on this. I think one of the most prominent, I think, what I've found in sites is there's a desire for change, there's a willingness for change. There's just not an understanding of how to go forward. And one of the the things, one of the biggest hiccups that we're seeing now, is just there's so much stuff. Staff are spending an enormous amount of time on forms, reporting hours and activities. I'm going to pause there because I don't do it justice. I'm going to let my colleague on to take on that one.

ANNA MASTRI: Hi, this is Anna, I would agree and just say, without getting too far down into the details of the operations and the requirements and all of that. I think there is what we often find a willingness to change, but these are staff and in many cases program managers and administrators at the state level who have no concept of expanding the possibilities. They have kind of been trained to respond to rules and regulations. So, a lot of times when we ask staff, how are things going? What things can be improved, they'll say, oh things are going great, and meanwhile we've just identified, you know basically half of the activities that they do are redundant, unnecessary, could be stripped away. They have no concept of the alternatives that are out there. And when it gets to the administrator level it's very similar. Unless they've come from a different place that was far more innovative, a lot of times they're just kind of restricted by the fact that they've been working in the system for a long time, and they've never really been given permission, I guess, to think outside of the box. So one really concrete example I can give you is, sending text messages instead of making phone calls to people to remind them to come to their appointments, was recently shot down by one of the sites that we work with because they said we can't send text messages without getting active consent. Obviously, there's no law against sending text messages to people without getting their active consent, many of us get them from our doctor's offices or whatever all the time, and you know, the program's already making phone calls. So, it's just an unwillingness to kind of, or maybe not unwilling, but it's difficult to conceive of what it would be like to do something a little bit differently. It's a shift in mindset that really has to occur, and it can be really challenging.

MICHELLE: Yeah, and I have to say I uphold, and not to brag on it, I just, the amount of efficiency she's been able to kind of, well inefficiency she's been able to identify and then take that and convert it into, here's a more efficient way to do kind of, to operate your program that gives space for new innovation, has been huge. And so, I think again, the biggest caution is that you're just going to throw on one more thing, we kind of joke about it, it's like the 50 layers of paint on the wall. And what we're saying is strip that down first, and then build out from there an intentional way of service delivery that is different than, kind of compliance oriented barrier removal that does rely on, as coaching intervention, that creates more meaning in the relationship. And so after the call we're happy to help with LI squared process. Anna's happy to answer any questions. She's done some great work in Ramsey County and elsewhere. And other sites around streamlining the program environment, and really doing it in a holistic way. And really kind of stripping it down to the essence and finding ways to reinvest existing resources. That kind of stuff, and this you can really, once you get that cleaned up, you really have so much more freedom to really explore and do things differently. And I think the other thing that I would add to that, is, in addition to kind of the complexity within the program environments, and that is, I would not underestimate the amount of energy required for cultural change. And I can talk extensively about that and some of the things that we've been able to do to get that shift in mindset. And for some people we just will never be able to. But for a lot of people we've been able to, to kind of move the needle. And when they do shift their mindset what we hear from staff is, I feel less stressed. Which is amazing.

MEGAN: Thank you Michelle, and we have just a couple of more questions here. What are some pitfalls that should be avoided? And what are some key mile markers or small wins that we can keep an eye out for?

MICHELLE: For LI squared or for the coaching?

MEGAN: That is a good question. I believe it would be regarding the change and the things that you were just discussing.

MICHELLE: The coaching, yeah, well I think that the slide where we shared with the challenges really, you know, those bullets. I think that applied to us in Goal4 It! But I think it applies to any kind of coaching intervention. Those are some of the, you know, I think the big pitfalls. And in terms of the mile markers, I just think those, you know, people think, they listen to the LI squared process and Oh my gosh, that's overwhelming. It's actually a very simple process, and it actually doesn't take a lot of time. It's just operating with greater intentionality, on a smaller scale. Work out the bugs, and then move forward, and go big once you've figured it out. It's prototyping in a sense. And so that's just my reflection. Anna, do you have anything to add?

ANNA: Uh no.

MICHELLE: Okay.

MEGAN: Thanks Michelle, and it looks like we've got a couple of more questions that have just come in. Based on your experience, what are the most effective messages for staff and leadership to ensure success?

MICHELLE: To ensure success in the LI squared process for sure, well anything that we do, that it's a collaborative process. That it is intended to reduce change fatigue. That this really is about not us coming and just telling you what to do. But it's this process where we inspire new ideas, new insights, but at the end of the day you own the change process. And, I mean I think, those things, you know, I always say, my whole goal is to work myself out of a job. That you do not need me. And so, that other piece around capacity building is also incredibly important to us, is co-creation. We're working alongside of you, we're figuring it out together and at the end of the day you know, we connect people through learning communities but we hope that they don't need us anymore. They usually come back with more problems or different problems or new innovation but over time, it's this capacity building process that. You know, and again, we've heard of this from sites. It changes identity. You know, one of the big things that when I set out three years ago, I was part of a system that we provided a lot of information to sites. But it was never transformational, and so when we set out, it was like, I want a process that's transformational. That changes the identity of programs. And that's why I feel like the sites that have embraced the LI squared process really feel like that's done for them.

MEGAN: Thank you and it looks like we have one last question here before we wrap up. What experiences can you share about systems change, staff buy in, and bringing everyone from the top to the front line onto the change bus?

MICHELLE: That's a huge question and I would say in terms of program change and really getting it, I think it is including staff at all levels. And in very strategic ways. And so, again the starting out with that learn visit, we're listening to people at all levels. Going into the innovate stage, what ends up happening oftentimes is that we'll come out, we'll spend some time. We'll set up a visit, we'll do the morning with administrators, the afternoon with the supervisors and direct service staff and next morning of the second day with administrators and then back to staff. And then, at strategic times we'll bring them all together. Even in the road test process we bring it back to administrators and we bring it back to staff. We never just bring it back to administrators in that process, at least I have not. It's always this iterative co-creative process where people at all levels are getting the information and have buy in. We were just out in Ohio, setting up a training on Goal4 It! And then setting up a road test. And a staff person said, yeah we provide the feedback, but we never hear from you guys again. We never get the information back. And I was able to say with confidence, we always come back, to the staff and we do a power point. We work with sites to develop their own power point, when we're under Improve, if we're doing the TA under another contract we may do it, but it's always that at all levels you're bringing people along. And it sounds like it's a lot of work. It's more about being intentional in your work. I mean, here's the deal, sites want three things. I've learned this over time. They want to know, I want an efficient process. We don't have a lot of time. We don't have a lot of resources. We need to make it as efficient as possible. They want to know, is it going to be safe. They want to know can I fail fast, can I make mistakes, can I play, can I be in that space? They want to know that there's safety in that. And they want to know third that it's going to make a difference. And those are the three things that guide every single thing that we do in terms of any time that I approach a site. Those three things are first and foremost in my mind. Anna, anything to add to that?

ANNA: No, thanks, Michelle.

MICHELLE: Okay, you can tell I'm passionate with no voice, sorry. We're happy to help through Project Improve. If you have any questions or interest in this kind of work. We have, it's contact your coach can get in touch with Damon, and then Damon can get in touch with us. We are open source, in terms of the LI squared process to share with you, in terms of what we do. You can use it in your own programs. We want this stuff to get used, to get out. Our desire is for program change and improvement.

DAMON: Thank you so very much Michelle. Just a quick closing note. Again, like Michelle said, please reach out to your coach. If you're interested in getting more information about the LI squared process through Project

Improve, and potentially working with Project Improve on your game plan. Thank you Michelle, Anna, and Scott and the entire improve team. Thank you also to Public Strategies, EMPath, MDRC, and all of the coaching teams for the ongoing support to each site. And most importantly, thank you to each of the sites for making this commitment to change, and integrating coaching for success into your TANF programs. Your coaches will continue to gather information from you on your specific TA needs and working with you on your game plan. So, on behalf of the Office of Family Assistance, we thank you for joining today's affinity call, and we'll be in contact. Everyone have a good day.

MEGAN: Thank you Damon.

MICHELLE: Are we staying on?

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